



# TREASURE VALLEY

ADA, ADAMS, BOISE, CANYON, ELMORE, GEM, OWYHEE, PAYETTE, VALLEY, & WASHINGTON COUNTIES

## EMPLOYMENT TRENDS

The Boise City Metropolitan Statistical Area's (MSA) average annual unemployment rate for April 2003 was 5.7 percent, as shown in Treasure Valley Table 1. This was two-tenths of a percentage point above the March 2003 rate of 5.5 percent and five-tenths of a percentage point above the April 2002 rate of 5.2 percent. Month-over-month, the number of employed persons decreased by 1,000, or 0.4 percent, from March 2003, and the number of unemployed individuals increased by 400 individuals, or 2.9 percent. The decreasing number of persons employed and the increasing number of persons unemployed created an overall decrease of 600 individuals, or 0.2 percent, in the *Civilian Labor Force*, from March 2003. Year-over-year, the number of employed persons has decreased by 3,600, or 1.5 percent, and the number of unemployed individuals increased by 1,200 individuals or 9.2 percent, creating a net decrease in the *Civilian Labor Force* of 2,400 individuals from April 2002. The *Civilian Labor Force* figures for April 2003 for all ten counties in Southwest Idaho are shown in Treasure Valley Table 2.

Treasure Valley Table 2: April 2003 Seasonally Adjusted Labor Force Figures for Southwest Idaho Counties				
	Civilian Labor Force	Number Unem- ployed	Percent Unem- ployed	Number Employed
Ada	178,277	9,442	5.3	168,835
Adams	1,758	201	11.4	1,558
Boise	2,652	149	5.6	2,503
Canyon	69,508	4,751	6.8	64,757
Elmore	9,928	795	8.0	9,132
Gem	6,097	495	8.1	5,602
Owyhee	4,079	89	2.2	3,991
Payette	9,713	822	8.5	8,890
Valley	4,131	350	8.5	3,781
Washington	4,295	430	10.0	3,866
Statewide	693,904	39,454	5.7	654,450

Treasure Valley Table 1: Boise MSA Labor Force & Employment  
Ada and Canyon Counties

	April 2003*	March 2003	April 2002	% Change Last Month	% Change Last Year
<b>INDIVIDUALS BY PLACE OF RESIDENCE</b>					
<b>Seasonally Adjusted</b>					
Civilian Labor Force	247,800	248,400	250,200	-0.2	-1.0
Unemployment	14,200	13,800	13,000	2.9	9.2
% of Labor Force Unemployed	5.7	5.5	5.2		
Total Employment	233,600	234,600	237,200	-0.4	-1.5
<b>Unadjusted</b>					
Civilian Labor Force	246,500	247,900	248,900	-0.6	-1.0
Unemployment	14,000	14,500	12,800	-3.4	9.4
% of Labor Force Unemployed	5.7	5.8	5.2		
Total Employment	232,500	233,400	236,100	-0.4	-1.5
<b>JOBS BY PLACE OF WORK</b>					
<b>Nonfarm Payroll Jobs**</b>	226,200	224,500	226,600	0.8	-0.2
<b>GOODS-PRODUCING INDUSTRIES</b>	45,000	44,400	46,500	1.4	-3.2
<b>Natural Resources &amp; Construction</b>					
<b>Manufacturing</b>	29,800	29,900	31,200	-0.3	-4.5
Durable Goods	22,900	23,000	24,300	-0.4	-5.8
Wood Product Manufacturing	1,800	1,800	1,800	0.0	0.0
Fabricated Metal Products Mfg.	1,400	1,400	1,400	0.0	0.0
Machinery Manufacturing	1,400	1,400	1,400	0.0	0.0
Computer & Electronic Manufacturing	14,200	14,200	15,900	0.0	-10.7
Transportation Equipment Mfg.	1,700	1,600	1,600	6.3	6.3
Other Durable Goods	2,400	2,600	2,200	-7.7	9.1
Nondurable Goods	6,900	6,900	6,900	0.0	0.0
Food Manufacturing	5,200	5,100	5,200	2.0	0.0
Printing & Related Support Activities	700	700	700	0.0	0.0
Other Nondurable Goods	1,000	1,100	1,000	-9.1	0.0
<b>SERVICE-PROVIDING INDUSTRIES</b>	181,200	180,100	180,100	0.6	0.6
<b>Trade, Transportation, &amp; Utilities</b>					
Trade	43,500	43,300	43,800	0.5	-0.7
Wholesale Trade	36,700	36,500	36,900	0.5	-0.5
Wholesalers, Durable Goods	10,400	10,400	10,100	0.0	3.0
Wholesalers, Nondurable Goods	6,600	6,600	6,300	0.0	4.8
Retail Trade	2,900	2,900	3,000	0.0	-3.3
Food & Beverage Stores	26,300	26,100	26,800	0.8	-1.9
General Merchandise Stores	4,000	4,000	4,100	0.0	-2.4
All Other Retail Trade	5,500	5,500	5,700	0.0	-3.5
Transportation, Warehousing, & Utilities	16,800	16,600	17,000	1.2	-1.2
Utilities	6,800	6,800	6,900	0.0	-1.4
Transportation & Warehousing	700	700	700	0.0	0.0
Information	6,100	6,100	6,200	0.0	-1.6
Telecommunications	3,600	3,500	3,700	2.9	-2.7
<b>Financial Activities</b>	1,400	1,400	1,300	0.0	7.7
Finance & Insurance	12,100	12,100	11,900	0.0	1.7
Real Estate & Rental & Leasing	9,200	9,100	8,900	1.1	3.4
<b>Professional &amp; Business Services</b>	2,900	3,000	3,000	-3.3	-3.3
Professional, Scientific, & Technical	31,800	31,400	31,600	1.3	0.6
Management of Companies & Ent.	9,700	9,800	10,100	-1.0	-4.0
Administrative & Support & Waste Mgmt.	6,800	6,800	6,800	0.0	0.0
<b>Educational &amp; Health Services</b>	15,300	14,800	14,700	3.4	4.1
Educational Services	27,500	27,300	26,800	0.7	2.6
Health Care & Social Assistance	2,000	2,100	2,300	-4.8	-13.0
Hospitals	25,500	25,200	24,500	1.2	4.1
<b>Leisure &amp; Hospitality</b>	8,900	8,900	8,900	0.0	0.0
Arts, Entertainment, & Recreation	19,400	19,200	19,500	1.0	-0.5
Accommodation & Food Services	2,600	2,300	2,200	13.0	18.2
Accommodation	16,800	16,900	17,300	-0.6	-2.9
Food Services & Drinking Places	1,900	2,000	2,100	-5.0	-9.5
Other Services	14,900	14,900	15,200	0.0	-2.0
<b>Total Government</b>	6,600	6,600	6,700	0.0	-1.5
Federal Government	36,700	36,700	36,100	0.0	1.7
State & Local Government	5,300	5,400	5,200	-1.9	1.9
State Government	31,400	31,300	30,900	0.3	1.6
State Government Education	13,900	13,700	13,300	1.5	4.5
State Government Administration	4,300	4,300	4,400	0.0	-2.3
Local Government	9,600	9,400	8,900	2.1	7.9
Local Government Education	17,500	17,600	17,600	-0.6	-0.6
Local Government Administration	10,100	10,300	10,500	-1.9	-3.8
	7,400	7,300	7,100	1.4	4.2

\* Preliminary Estimate

\*\*Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

In the Boise City MSA *Nonfarm Payroll Jobs* increased by 1,700, or 0.8 percent, from March 2003 to April 2003, while over the year, *Nonfarm Payroll Jobs* lost 400 jobs in the Boise City MSA. Month-over-month, *Goods-Producing Industries* gained 600 jobs; job decreases were noted in *Other Durable Goods Manufacturing* (-200 jobs) and *Other Nondurable Goods Manufacturing* (-100 jobs), while job gains were noted in *Natural Resources & Construction* (700 jobs), *Transportation Equipment Manufacturing* (100 jobs), and *Food Manufacturing* (100 jobs). Year-over-year, *Goods-Producing Industries* lost 1,500 jobs, with *Transportation Equipment Manufacturing* (100 jobs) and *Other Durable Goods Manufacturing* (200 jobs) the only industries to experience job gains, while job losses occurred in *Natural Resources, Mining, & Construction* (-100 jobs), and *Computer & Electronic Product Manufacturing* (-1,700 jobs).

In *Service-Providing Industries*, job gains outweighed jobs lost; 1,100 jobs were added from March 2003 to April 2003. Job gains were experienced in *All Other Retail Trade* (200 jobs), *Information Services* (100 jobs), *Finance & Insurance Services* (100 jobs), *Administrative & Support & Waste Management Services* (500 jobs), *Health Care & Social Assistance Services* (300 jobs), *Arts, Entertainment, & Recreation Services* (300 jobs), *State Government Administration* (200 jobs), and *Local Government Administration* (100 jobs). Job losses were noted in *Real Estate & Rental & Leasing Services* (-100 jobs), *Professional, Scientific, & Technical Services* (-100 jobs), *Educational Services* (-100 jobs), *Accommodation Services* (-100 jobs), *Federal Government* (-100 jobs), and *Local Government Education* (-200 jobs). Year-over-year, *Service-Providing Industries* gained 1,100 jobs, with job losses noted in *Nondurable Goods Wholesale Trade* (-100 jobs), *Food & Beverage Stores* (-100 jobs), *General Merchandise Stores* (-200 jobs), *All Other Retail Trade* (-200 jobs), *Transportation & Warehousing Services* (-100 jobs), *Information Services* (-100 jobs), *Real Estate & Rental & Leasing Services* (-100 jobs), *Professional, Scientific, & Technical Services* (-400 jobs), *Educational Services* (-300 jobs), *Accommodation Services* (-200 jobs), *Food Services & Drinking Places* (-300 jobs), *Other Services* (-100 jobs), *State Government Education* (-100 jobs), and *Local Government Education* (-400 jobs). Job gains were noted in *Durable Goods Wholesale Trade* (300 jobs), *Telecommunications Services* (100 jobs), *Finance & Insurance Services* (300 jobs), *Administrative & Support & Waste Management Services* (600 jobs), *Health Care & Social Assistance Services* (1,000 jobs), *Arts, Entertainment, & Recreation Services* (400 jobs), *Federal Government* (100 jobs), *State Government Administration* (700 jobs), and *Local Government Administration* (300 jobs). The slow growth of jobs over the year is consistent with the downturn

and slow recovery that the national economy has been experiencing since January 2001.

#### **SPECIAL TOPIC: Per Capita Income Update**

The Bureau of Economic Analysis released Personal Per Capita Income (PCI) figures in May. Treasure Valley Table 3 shows the changes in PCI for all counties in Southwest Idaho. Blaine County is ranked number one, followed by Ada and Valley County. In terms of actual growth, from 2000 to 2001, Owyhee County had the largest percentage increase—4.7 percent—while Valley County showed the largest dollar increase at an increase of \$829. The PCI and state ranking among all counties in Southwest Idaho are as follows: Ada County (2) decreased \$225 to a PCI of \$33,739; Adams County (12) increased \$669 to a PCI of \$21,635; Boise County (29) increased \$318 to a PCI of \$19,502; Canyon County (34) increased \$29 to a PCI of \$18,690; Elmore County (21) increased \$756 to a PCI of \$20,919; Gem County (32) decreased \$241 to a PCI of \$19,263; Owyhee County (38) increased \$780 to a PCI of \$17,251; Payette County (27) increased \$809 to a PCI of \$19,956; Valley County (3) increased \$829 to a PCI of \$28,315; and Washington County (40) increased \$447 to a PCI of \$16,847. The state of Idaho had an increase of \$519 from 2000 to a 2001 PCI of \$24,506 and the United States increased \$653 to a PCI of 30,413 in 2001.

Treasure Valley Table 3: Per Capita Income					
	2000	2001	\$ change	% change	state rank
Ada County	\$ 33,964	\$ 33,739	\$(225)	-0.7	2
Adams County	\$ 21,635	\$ 22,304	\$669	3.1	12
Boise County	\$ 19,184	\$ 19,502	\$318	1.7	29
Canyon County	\$ 18,661	\$ 18,690	\$29	0.2	34
Elmore County	\$ 20,163	\$ 20,919	\$756	3.7	21
Gem County	\$ 19,504	\$ 19,263	\$(241)	-1.2	32
Owyhee County	\$ 16,471	\$ 17,251	\$780	4.7	38
Payette County	\$ 19,147	\$ 19,956	\$809	4.2	27
Valley County	\$ 27,486	\$ 28,315	\$829	3.0	3
Washington County	\$ 16,400	\$ 16,847	\$447	2.7	40
Boise City MSA	\$ 29,294	\$ 29,109	\$(185)	-0.6	
State of Idaho	\$ 23,987	\$ 24,506	\$519	2.2	
United States	\$ 29,760	\$ 30,413	\$653	2.2	

#### **AREA DEVELOPMENTS**

##### **Boise City MSA**

- For the fourth consecutive year, the Boise City MSA was ranked in Forbes Magazine's list of the 10 best places to do business and advance a career in America. The metropolitan area ranked second this year, compared to ranking sixth in 2002, seventh in 2001, and fifth in 2000. The ranking is based on eight business categories including

wage and salary growth, job growth, quality of life, high-tech clustering, access to capital, a pro-business government orientation, strong work ethic, universities, crime rates, and housing costs. Austin, Texas, was the only metropolitan area that ranked above the Boise City MSA on the fifth annual listing. Other areas in the top ten included: Raleigh-Durham, N.C.; Atlanta, Ga.; Madison, Wisc.; Provo, Utah; Omaha, Nebr.; Des Moines, Iowa; Dallas, Tex.; and Washington D.C.-Northern Virginia.

- Bekins Northwest closed its Boise operations center, at 970 River Street in early May. The closing left 20 people unemployed. Bekins officials cited a drop in revenue as the reason for the closure, blaming the weak economy and the slowing demand for moving services as factors that contributed to the drop in revenues. Employees affected by the closure were offered limited severance packages as well as given the opportunity to apply for other positions within the company.
- Hawaiian Vacations announced in mid-May that it would start a weekly nonstop flight service to Maui in November. About 202 passengers can be accommodated on the Boeing 757-200 that will fly the service. The weekly service will run on Saturdays.
- Hewlett-Packard Co. announced in mid-May that it would cut an additional 3,500 jobs in an effort to trim costs. Company officials did not state where the layoffs would occur, and no information has been released on whether the announcement would affect workers at the Boise campus.
- In early May, the state legislature approved \$68.5 million in public works construction projects, which included the first classroom building for the Boise State University-West campus. The building costs \$8.7 million and will be financed through long-term bonds issued by the State Building Authority.
- Northwest Nazarene University (NNU) recently held a groundbreaking ceremony for a \$2.8 million, 55,000-square-foot expansion to Montgomery Fieldhouse. The new complex will include three basketball courts, cardiovascular and weight-training centers, an indoor baseball and softball diamond, running track, volleyball practice space, two guest and VIP suites, and additional office and classroom space. The expansion is scheduled for completion in March 2004.
- Lithia Ford announced plans to move into its new Boise complex in early August. The new dealership is under construction at the corner of Fairview and Maple Grove in Boise.
- Tom Scott Honda recently finished construction and landscaping on its new 11<sup>th</sup> Avenue North dealership in Nampa. Tom Scott moved from its former facility at 3020 East Cleveland Boulevard in Caldwell. The new dealership is larger than the previous location and features 10 service bays, which should speed customer service.
- The former Tom Scott Honda location at 3020 East Cleveland Boulevard in Caldwell was purchased by Kane Automotive Group 2, which has announced plans to open a Kia dealership at the location in mid-June. Company officials also announced that construction is expected to start in mid-June on a 26,000-square-foot permanent facility near the Idaho Center in Nampa.
- Kachina Aviation announced that it would move its headquarters from Boise to Nampa later this year. The company will set up its new base for operations on land that was leased from the City of Nampa at Nampa Municipal Airport. Company officials have submitted construction plans for a new hangar and hope to move by November 1.
- The Caldwell YMCA recently opened an office at 911 Main Street. A fundraising campaign is underway as the facility is expected to cost between \$12 and \$14 million. At the kickoff, the Wittenberger Foundation donated \$180,000 for the new facility. The new YMCA will include youth activities, fitness centers, a climbing wall, and other activities. Groundbreaking is scheduled for September; the facility is scheduled to open in January 2005.
- Other recent business happenings in the Boise City MSA include the renaming of The Bon to The Bon-Macy's (starting August 1), the closing of Lookin' Sporty in the Northgate Shopping Center in Boise, the opening of Big Lots in the Cherry Plaza Shopping Center in Meridian, the opening of Pioneer Title at the Legends Building near the Idaho Center in Nampa, the opening of a shared-use commercial kitchen by the University of Idaho business incubator in Caldwell, the reopening of Alsip & Persons Funeral Chapel after completion of its recent renovations in Nampa, the reopening of Producers Supply Co-op at its new location at 2114 20<sup>th</sup> Street North in Nampa, the reopening of Caldwell Orthodontics Associates at

its new location at 3611 South 10<sup>th</sup> Avenue in Caldwell, and the groundbreaking of a new Home Federal Savings bank at 923 Dearborn in Caldwell.

#### **Elmore County**

- The Mountain Home School District announced in late May that it would not lay off any teachers for the 2003-2004 school year. The district had already placed a number of teachers on the Reduction in Force list, but took them off of the list last week as district officials decided that the budget shortfall could be taken care of through attrition. Several one-year contracts will not be renewed and some teachers retired this year, allowing the district to keep teachers currently under contract.

#### **Gem County**

- The Cottages assisted living facility opened a second building on its property located on the corner of East Twelfth Street and Judo Lane in Emmett. The Cottages can accommodate about 30 residents.
- King's Discount Department Store opened in Emmett recently. The store is located at 111 Highway 16, and is open Monday through Friday, 9 a.m. to 9 p.m., Saturday, 9 a.m. to 7 p.m., and Sunday, 11 a.m. to 5 p.m.
- In early May, a \$170,000 grant from the Idaho Department of Commerce and the U.S. Department of Housing and Urban Development, was approved by Governor Dirk Kempthorne for the community of Emmett. The money will add a five-bay addition to the front of the Gem County Emergency Services building. The addition will make room for the department's four ambulances and allow room for a fifth. The existing building will be remodeled to house two bedrooms, two restrooms with showers, a kitchenette, a day room, an office, a storage room, and a training room. The funds for the project will be available in July.

#### **Valley County**

- The Cascade Rural Fire District broke ground in mid-May on an addition to its current facility. The addition will extend from the south side of the current fire station on Front and Pine Streets in Cascade. The new facility will include space for seven emergency vehicles, storage, and possibly a second story with offices, a kitchen, and classroom space. The addition is scheduled for completion in November.

- The Hunt Lodge, a Holiday Inn Express, opened on May 15 in McCall. The 85-room hotel opened on Third Street across from the Pancake House. The hotel has a pool, spa, fitness room, breakfast facility, and a meeting room that can accommodate 200 people.
- Whitetail Club reopened on May 15 in McCall. The resort is still restricted to members and guests, but there are lower rates on room rentals. Whitetail officials also announced that it would remain open during the winter to cater to winter recreation activists and offer seasonal packages for skiing, golf, hunting, and other getaways. Whitetail golf course opened on June 1.
- Tamarack officials recently announced that the resort would open its hills for skiing on December 23, 2003, which is a year earlier than originally scheduled. Foundation work is scheduled to start in July on the site with the towers installed in September. Installation of two high-speed detachable four-person chairlifts and a platter lift are scheduled for this summer. The first phase of the resort also includes an 18-hole golf course, a 22-kilometer Nordic skiing trail system, 60 ski-in and ski-out private lots, 20 chalets, hiking and mountain biking trails, and a private resort club.
- Brundage Mountain Resort was recently granted approval to proceed with expansion plans this summer. The resort expects to start in July on a project to clear a number of new runs, expand the parking lots, and construct access roads for new lifts.

#### **Washington County**

- The National Oldtime Fiddlers' Contest (NOFTC) and National Oldtime Fiddlers' Association moved to its new location at 115 West Idaho Street in Weiser, the former Weiser Pump & Pipe Building. The move marks the first time in the 51-year history of the national fiddling contest that the support organization will have its own office. The NOFTC recently shared office space with the Weiser Chamber of Commerce.

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